



REQUEST FOR COPY OF PERSONAL INCOME TAX OR FIDUCIARY RETURN

Please see other side of this form to request Bank & Corporation (100, 100S, 100WE or 199) or Partnership (565) Returns.

NAME AND ADDRESS PHOTOCOPIES ARE TO BE MAILED TO		NAME AND ADDRESS OF TAXPAYER(S) AS SHOWN ON TAX RETURN/CLAIM	
TAX RETURN REQUESTED (Check box)		Tax Year(s)	SOCIAL SECURITY NUMBER(S) (If Joint return enter spouse's SSN below)
<input type="checkbox"/> 540 <input type="checkbox"/> 540A <input type="checkbox"/> 540EZ <input type="checkbox"/> 540ADS or <input type="checkbox"/> 540NR <input type="checkbox"/> PIT Return			
<input type="checkbox"/> 541 — Fiduciary Income Tax Return			SPOUSE'S SSN
SIGNATURE OF TAXPAYER		TYPE OR PRINT NAME	DATE
SIGNATURE OF SPOUSE			
DAYTIME TELEPHONE NUMBER ()			

Tax returns are available ONLY for the last 4 years.

You must sign this request. Without proper authorization we will be unable to provide you with the requested copies. If you are not the taxpayer, you must provide appropriate authorization to receive copies of tax returns or claims. Appropriate authorization includes one of the following:

- a letter signed by the taxpayer authorizing Franchise Tax Board (FTB) to release the requested material to you;
- OR
- a Power of Attorney (FTB 3520) currently in effect (signature, dated within 30 days unless a specific time limit or tax year is stated);
- OR
- an Internal Revenue Service (IRS) Power of Attorney stating that it applies to FTB (above limitations still apply);
- OR
- FTB 3516 (this form) signed by the taxpayer;
- OR
- in the case of a deceased taxpayer, a certified copy of the letters of administration or testamentary, dated within the past 12 months. If the letters are more than 12 months old, a clerk of the court must recertify them stating they are still in effect.

If a bankruptcy is involved and you are not the taxpayer, you must:

- provide court documents appointing you as trustee;
- OR
- provide a letter signed by the trustee authorizing you to receive this material and a copy of the court documents appointing the trustee;
- OR
- provide appropriate authorization.

Personal Income Tax/Fiduciary Returns are retained for four years from the due date (or extended due date) or four years after filed with the Franchise Tax Board.

There is no charge for a copy of your Personal Income Tax return if the tax year requested meets the following criteria:

- The copy of the return is requested during or after an audit or collection activity.
- You have been a victim of a designated California state or federal disaster.

If you do not meet either of the above criteria, send a check for \$10.00 for each tax year requested, payable to the Franchise Tax Board.

Mail your request to:
State of California
Franchise Tax Board
ATTN: RID Unit
P.O. Box 942840
Sacramento, CA 94240-0060
For additional information call (916) 845-5375.



NAME AND ADDRESS PHOTOCOPIES ARE TO BE MAILED TO

NAME AND ADDRESS OF TAXPAYER(S) AS SHOWN ON TAX RETURN/CLAIM

I declare under penalty of perjury, that I am a Current Corporate Officer of the above Corporation.		
SIGNATURE AND TITLE OF OFFICER OR TRUSTEE	TYPE OR PRINT NAME	DATE
 DAYTIME TELEPHONE NUMBER ()		

If a bankruptcy is involved and you are not the taxpayer, you must:

- OR**

- OR**

- FTB 3516 (REV 5-95) SIDE 2 – B&C